

## Delivering the Next **Generation** of Health Care

Advancing team-based management.  
Coordinating across the continuum of care.  
Maximizing quality and accountability.  
Investing in innovation.



**CARE IS THE HEART  
OF OUR WORK<sup>SM</sup>**

National Home- and Community-  
Based Services (HCBS) Conference

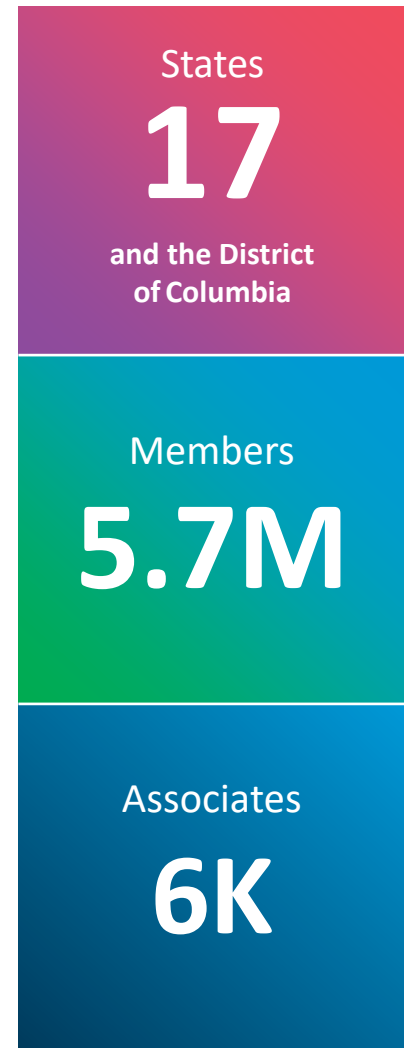
Baltimore — August 31, 2017

# Setting the Stage

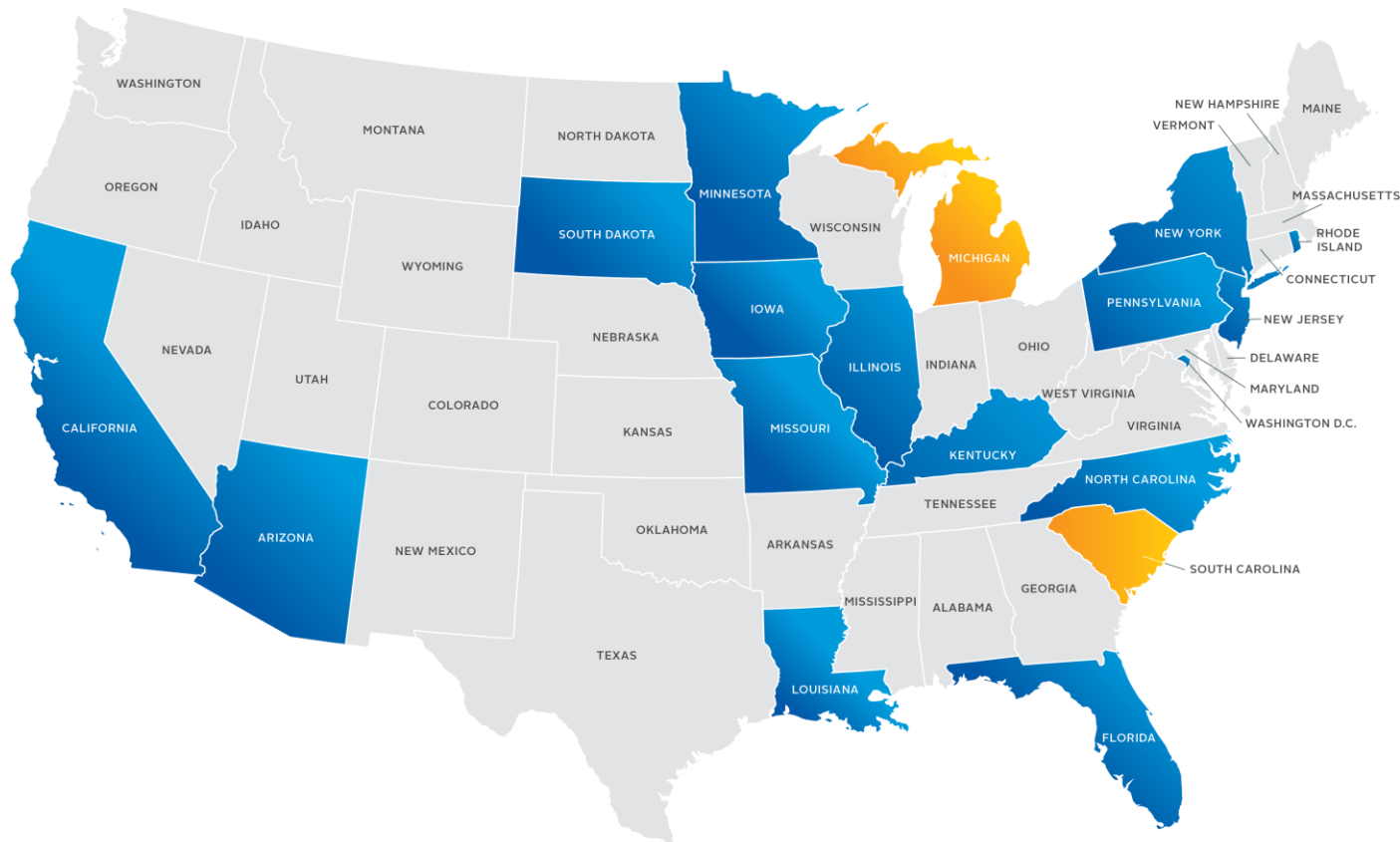
- More than 10 million Americans are dually eligible for Medicare and Medicaid.
  - Poorest, sickest, and costliest beneficiaries.
  - Often receive fragmented, uncoordinated care due to program misalignments.
- In 2011, the Centers for Medicare & Medicaid Services (CMS) launched the Financial Alignment Initiative to test new models to integrate Medicare and Medicaid.
- CMS and states contract with Medicare-Medicaid plans (MMPs), which are responsible for managing the full range of covered services for dually eligible beneficiaries.
  - Ten states participate in demonstrations: CA, IL, MA, MI, NY, OH, RI, SC, TX, VA.
  - Demonstration enrollment is 391,440 as of June 2017; 31.2 percent of those eligible are enrolled.



# AmeriHealth Caritas' National Footprint



# AmeriHealth Caritas' MMP Plans



- AmeriHealth Caritas operates two MMPs.
- Key lessons learned for integrating care for dually eligible individuals.
- Fundamental takeaway: Policy and operational undertaking of this magnitude takes time and requires unmatched effort to develop structures, policies, and procedures to improve care.

# Great Intentions: Lessons Learned

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Healthy Connections Prime

August 31, 2017

# Agenda

## History & Background

## Stakeholder Engagement

## Program Design

- Person-Centeredness
- Support for Family Caregivers
- HCBS Integration
- Palliative Care
- Building Capacity and Core Competencies

## Resources

# History and Background

## South Carolina's Initiative

Healthy Connections Prime Implemented: **February 2015**  
 Demographic: **Medicare-Medicaid Enrollees 65 years and older**

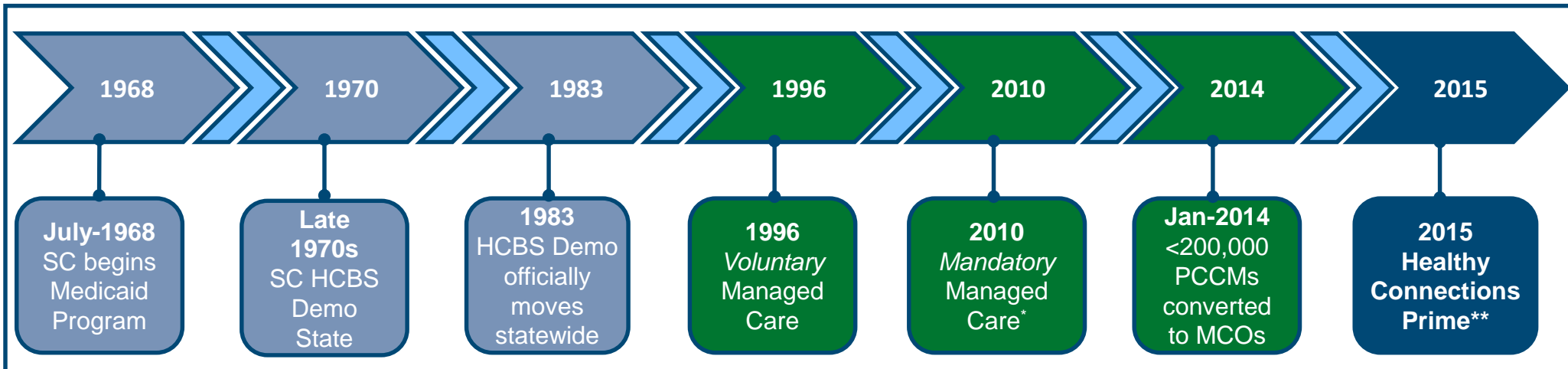
Current Membership: **11,468**

Model of care includes **full continuum** of Medicare and Medicaid services and leverages **person-centered care coordination** for all members

**Three Medicare-Medicaid Plans (MMP)**



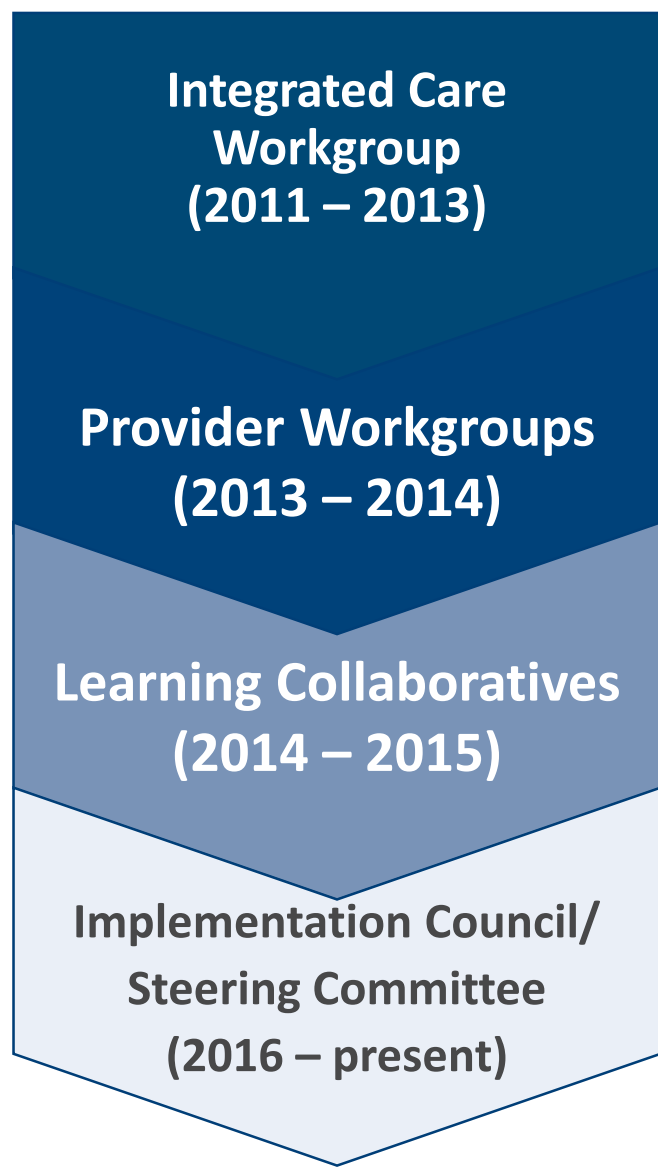
- Healthy Connections Prime is available
- Healthy Connections Prime is not yet available



\*South Carolina's operated two coordinated care delivery models – managed care and primary care case management (PCCM). Some populations and services were excluded from managed care including dual eligibles, behavioral health, nursing facility and home and community services.

\*\*Persons residing in a nursing facility at the time of enrollment or persons with enrolled in an waiver for individuals with intellectual or developmental disabilities are not eligible for enrollment.

# Stakeholder Engagement



- Provided **input during planning** phase
- Determined **key program design features** (*i.e., demographic, population, geography*)
- Addressed specific needs primarily related to **long-term services and supports**
- Created platform to **exchange ideas and best practices** for health plans and providers
- Provides **meaningful feedback**
- Supports **dissemination of information** to broader stakeholder audience
- Inform on-going program activities as well as the **strategic plan** for long term program vision



# Program Design: Person-Centeredness

## Comprehensive assessment

Medicare-Medicaid Plans (MMPs) use **uniform assessment tool**

Conducted **face-to-face**, primarily in members' homes

94.5% completed within **90 days of enrollment\***

Measures **psychosocial, functional, behavioral** health

Includes assessment of **home and caregiver supports**

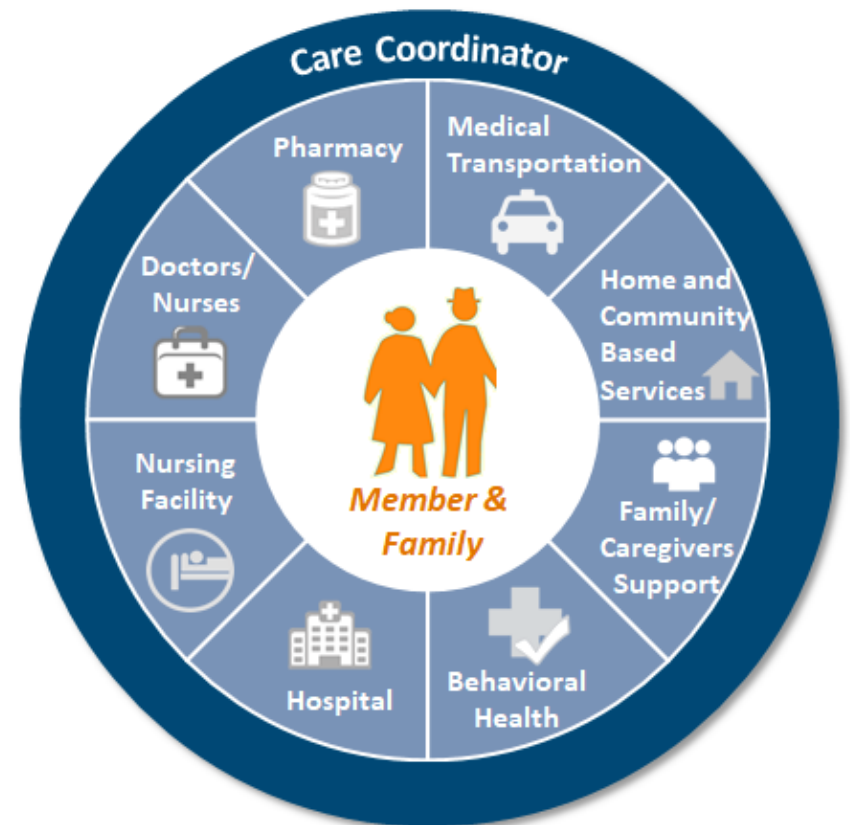
Influences **individualized care plan**

Average member to care coordinator ratio: **1:120**

## Multidisciplinary Team

Replaces **'rules based'** care management

Addresses **social determinants** of health (i.e., housing, food insecurity, transportation)



\*Note: Source: MMP reported quarterly monitoring measure data. Measure data are provided for informational purposes only and do not constitute official evaluation results. The number represents the percentage willing participate and who could be reached who had an assessment completed within 90 days of enrollment. Full measure specifications can be found in the core and state-specific reporting requirements documents, which are available at: <https://www.cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialAlignmentInitiative/InformationandGuidanceforPlans.html>.

# Program Design: Family Caregivers

## Healthy Connections Prime recognized by AARP for its:

Caregiver assessment

Care coordinator training

Quality measurements related to caregiver supports (i.e., required caregiver focused Quality Improvement Project)



**“The caregiver-as-provider role places them in a critical position to affect outcomes that matter to the managed care organization.”**

## South Carolina Caregivers



700,000 caregivers in SC



Care is valued at over \$7 billion



Caregivers arrange transportation, help with grocery, finances, meal prep, and housework

Source: N., & A. (2015). 2015 Report: Caregiving in the U.S. Retrieved June 5, 2017, from <http://www.aarp.org/content/dam/aarp/ppi/2015/caregiving-in-the-united-states-2015-report-revised.pdf>  
AARP. (2013). Long-Term Care in South Carolina. Retrieved June 5, 2017, from [http://www.aarp.org/content/dam/aarp/research/surveys\\_statistics/general/2013/Long-Term-Care-in-South-Carolina-AARP-res-gen.pdf](http://www.aarp.org/content/dam/aarp/research/surveys_statistics/general/2013/Long-Term-Care-in-South-Carolina-AARP-res-gen.pdf)

# Program Design: Palliative Care

## New Benefit Under Demonstration

49% or 1,237 of members appropriate for palliative care received this benefit in 2016  
Center for Advanced Palliative Care provided input on **messaging** of benefit in 2018  
member material to promote quality of life

### Prior Language

“Advanced  
illness”

“Life-threatening  
injury

“End-of-life”

### Updated Language

- Specialized medical care for “**people with serious illnesses**”
- Goal is to “improve **quality of life for both the patient and family**”
- Provides “**extra layer of support**” to patient’s doctors
- “Appropriate at **any stage** of serious illness”; can be “provided together with **curative treatment**”

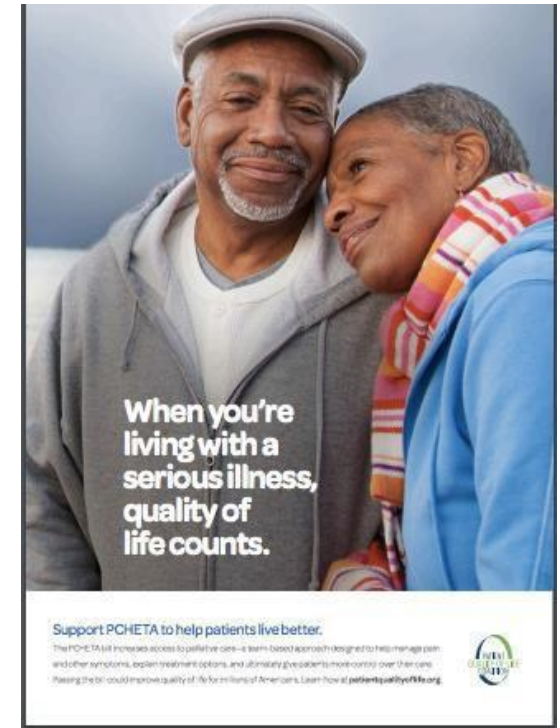


Image by [Patient Quality of Life Coalition](#)

# Program Design: HCBS Integration

**Objective:** Honor tenets of care integration and MMP capacity without compromising integrity of existing HCBS model

## Approach

Seamless beneficiary experience by **building upon the 30-year history and infrastructure** to ensure system is not dismantled as the state progresses towards a sustainable transformation

**Maintain parallel program in fee-for-service** system for beneficiaries not enrolled

Consider **MMP capacity to manage HCBS** while fully integrating medical and behavioral health services → **Phased transition** of HCBS responsibilities to MMPs\*

Incorporate **MMP benchmarks and readiness standards** at each phase

## Desired Outcomes

- Decreased utilization of institutional care
- Increased waiver enrollment
- Rebalancing of long-term care expenditures



## Experience To Date

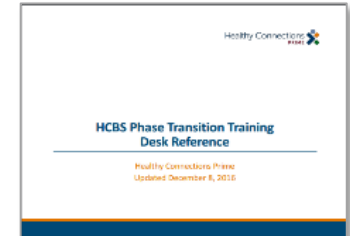
- Average of **15% of members enrolled in waiver**
- MMPs leverage **HCBS-like services** for members who do not otherwise qualify for waiver services
- Increased **emphasis on respite**
- Challenge: Access to waiver **hindered by financial eligibility processing**

\*Note: The state retains responsibility over provider compliance, the state's waiver case management system, and both the initial waiver assessment and the initial level of care determination.

# Building Capacity and Core Competencies

## MMP Trainings and Program Guidance

- **70 SCDHHS-sponsored trainings**, including those facilitated by the Office for the Study of Aging and other partners. (e.g., HCBS transition desk reference and Learning Collaboratives)
- **19 FAQs and memos**



*HCBS Desk Reference for MMPs*

## Provider Outreach

- **1,344 HCBS MMP contracted providers** representing 47.3% of all HCBS providers
- **35 trainings/presentations** to provider groups
- **17 notices and FAQs** on key issues



*Guidance for Waiver Case Managers*

## Key Activities

- **E-Learning Management System** launched
- On-Line **Training Repository and Provider Tool Kits**
- MMPs required to complete **dementia competent training**



# Resources

## Training and Education

Dementia Dialogues | [Link](#)

MMP E-Learning Platform | [Link](#)

## Program Guidance

Serious Reportable Events | [Link](#)

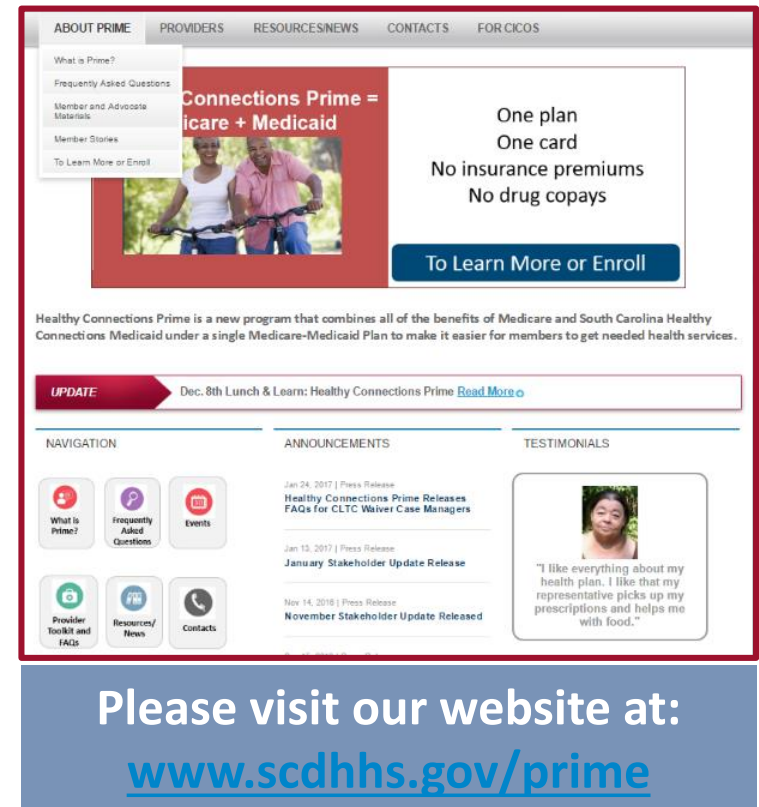
Emergency Preparedness | [Link](#)

HCBS Provider Transition FAQs | [Link](#)

## Other

South Carolina Readiness Review Tool | [Link](#)

MMP Specific Program Guidance | [Link](#)



The screenshot displays the website for Healthy Connections Prime. At the top, there is a navigation menu with links for 'ABOUT PRIME', 'PROVIDERS', 'RESOURCES/NEWS', 'CONTACTS', and 'FOR CICOS'. A dropdown menu is open under 'ABOUT PRIME', listing 'What is Prime?', 'Frequently Asked Questions', 'Member and Advocate Materials', 'Member Stories', and 'To Learn More or Enroll'. The main content area features a large red banner with the text 'Connections Prime = Medicare + Medicaid' and a photo of two people riding a bicycle. To the right of the banner, it lists benefits: 'One plan', 'One card', 'No insurance premiums', and 'No drug copays', with a 'To Learn More or Enroll' button. Below the banner, a paragraph explains that Healthy Connections Prime is a new program combining Medicare and South Carolina Healthy Connections Medicaid. An 'UPDATE' section highlights a 'Dec. 8th Lunch & Learn: Healthy Connections Prime' with a 'Read More' link. The bottom section is divided into three columns: 'NAVIGATION' with icons for 'What is Prime?', 'Frequently Asked Questions', and 'Events'; 'ANNOUNCEMENTS' with three press releases from Jan 24, 2017; Jan 13, 2017; and Nov 14, 2016; and 'TESTIMONIALS' featuring a photo of a woman and her quote: 'I like everything about my health plan. I like that my representative picks up my prescriptions and helps me with food.'

Please visit our website at:  
[www.scdhhs.gov/prime](http://www.scdhhs.gov/prime)

# Thank You!



# Good Intentions: Lessons Learned

Integrated Care Coordination from an MMP's perspective

**Jay N. Powell, FACHE**

Vice President and Executive Director,  
First Choice VIP Care Plus by Select Health of South Carolina (South Carolina MMP)





# Our History and Mission

Select Health of South Carolina is a part of the AmeriHealth Caritas Family of Companies — one of the nation's largest Medicaid managed care organizations. Through the First Choice health plan, we serve more than 350,000 members across South Carolina as one of the state's largest health plans.

Our mission-based, National Committee for Quality Assurance (NCQA)-recognized health care solutions make lasting improvements in the communities we serve by aiding those who need us most. With innovative community outreach solutions and access to our extensive network of providers, our members receive the commitment, attention, and health care they deserve.

Select Health launched First Choice VIP Care Plus as an MMP in February 2015. It is currently the largest Coordinated Integrated Care Organization (CICO) participating in Healthy Connections Prime, South Carolina's MMP with over 5,100 dual eligible members spread across 39 counties.

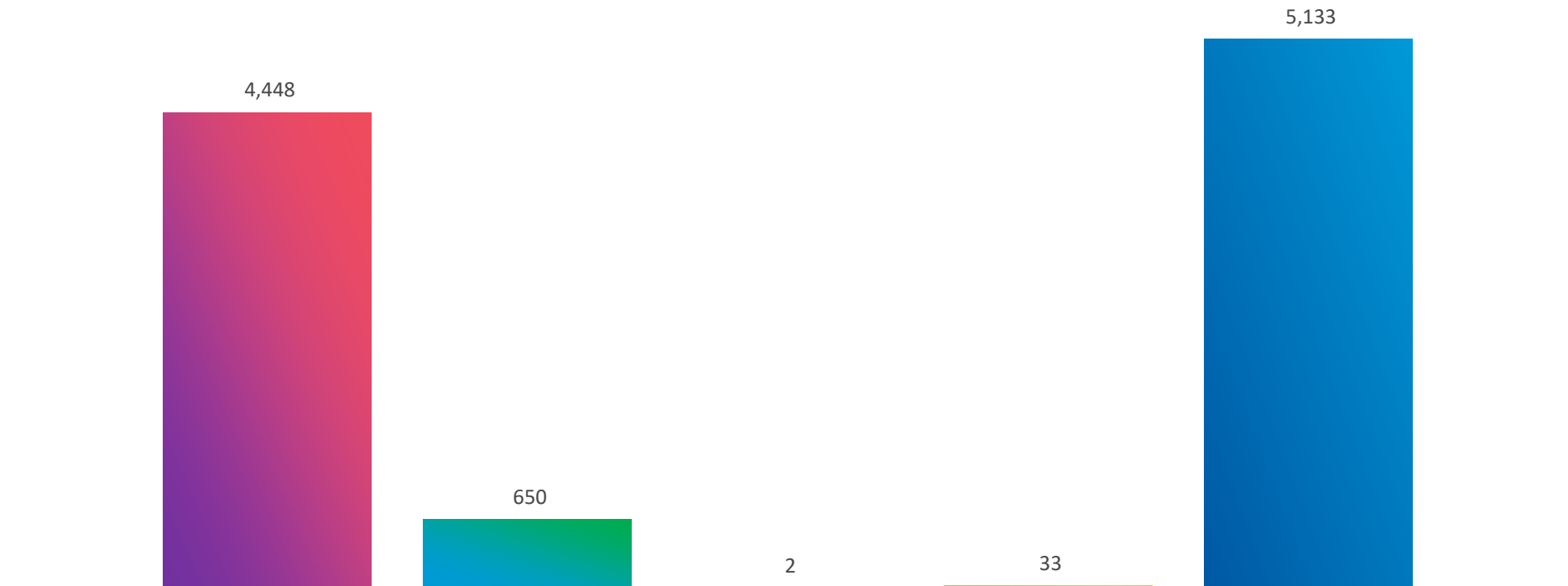
**We help people get care, stay well, and build healthy communities.**



# First Choice VIP Care Plus Membership Mix

## First Choice VIP Care Plus Member Mix (as of May 1, 2017)

Community    HCBS waiver    HCBS waiver-plus    Nursing facility    Total health plan membership



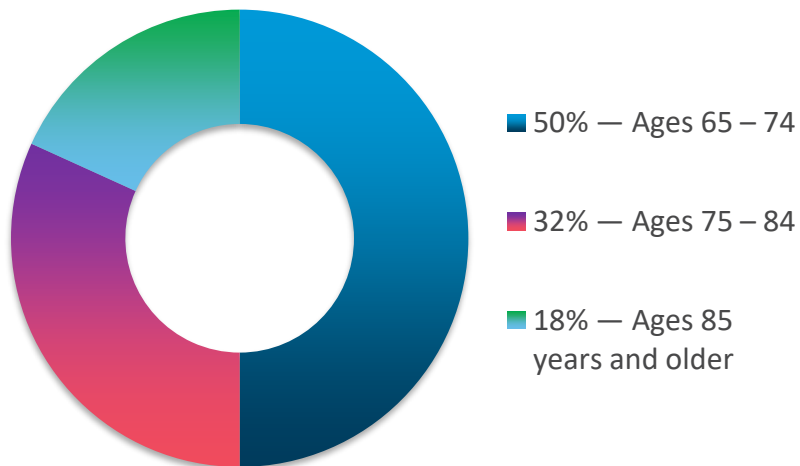
# First Choice VIP Care Plus Membership Mix



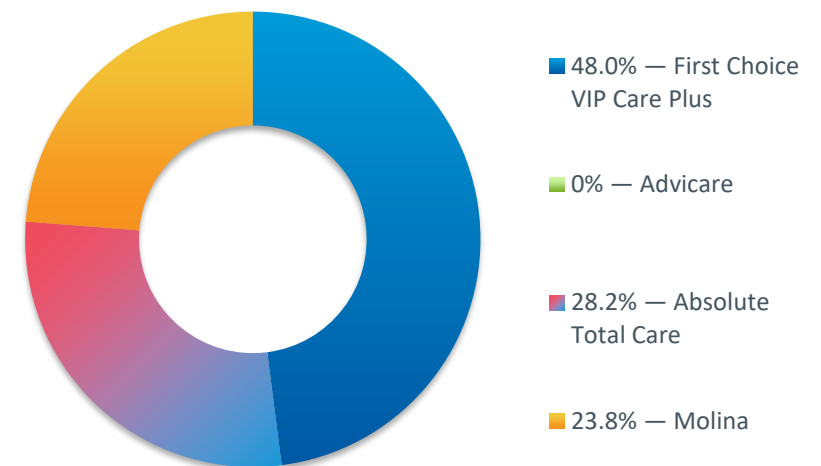
August 2017 membership

# 5,133

## Membership mix



## Market share

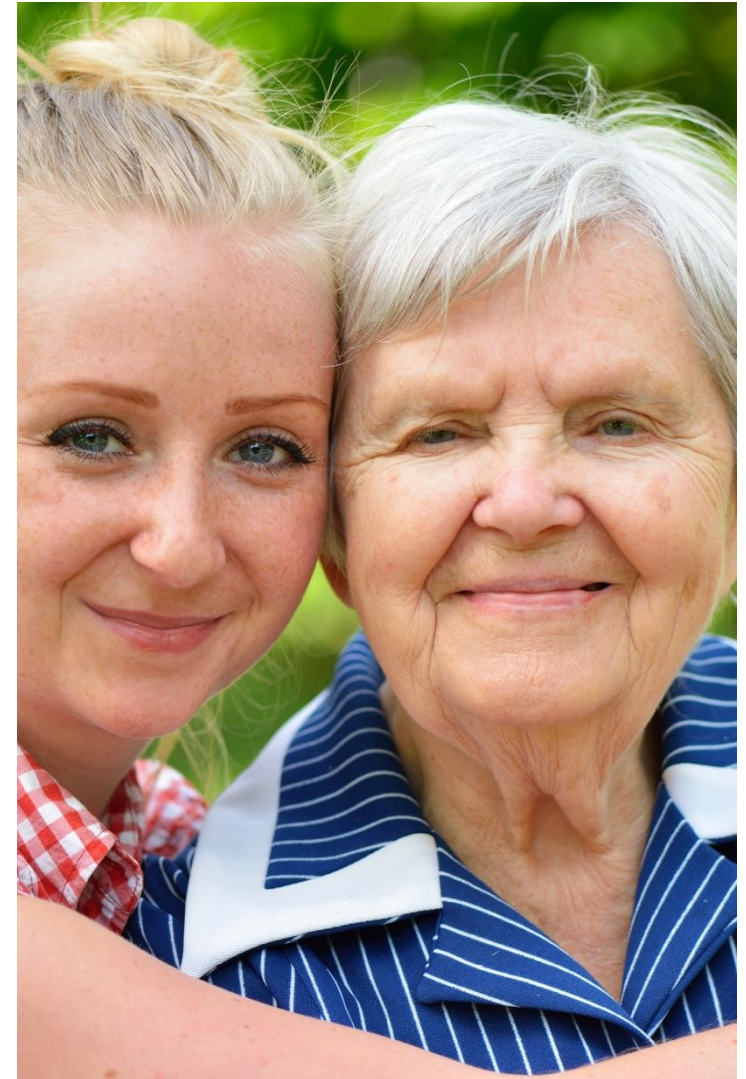


# Good Intentions — The Model of Care Is Our Road Map

## Lessons learned: One size does not fit all

The Model of Care is a living and breathing document.

- Medical complexity of membership is greater than expected.
- Person-centered planning evolves over time.
- Addressing social determinants is paramount.
- Issues in the dual eligible population that negatively impact health outcomes and increase costs include:
  - Frequent emergency room (ER) visits.
  - Hospital readmissions.
  - Poor medication adherence.
  - Lack of adequate and supportive housing.
  - Absent or limited caregiver support.
  - Opioid and illegal substance addiction.



# Good Intentions — If We Build It, They Will Come

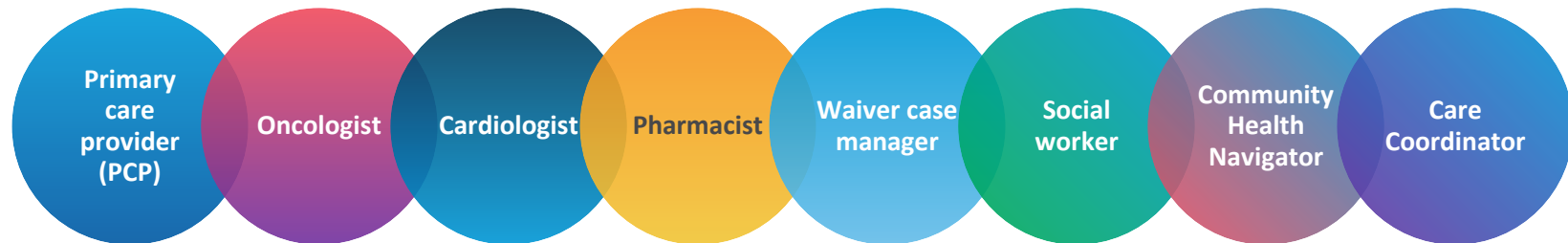
## Lessons learned: Stakeholder engagement is key — it takes a village

### Goal:

Collaboration **among** the care team, Care Coordinator, the member, and the multidisciplinary team yields a **Member Individual Care Plan** and a **Health Action Plan** that are specifically designed to meet the member's health and personal needs.

### Example:

Kathy L. is a 78-year-old female with a history of coronary artery disease, obesity, and gastroesophageal reflux disease. She was recently diagnosed with stage II lung cancer. Kathy lives in a boarding home and receives HCBS. She is taking two high-risk medications (warfarin and diphenhydramine). Based on Kathy's medical diagnoses, new life-threatening condition, and minimal support system, as well as the presence of high-risk medications, her multidisciplinary team consists of:

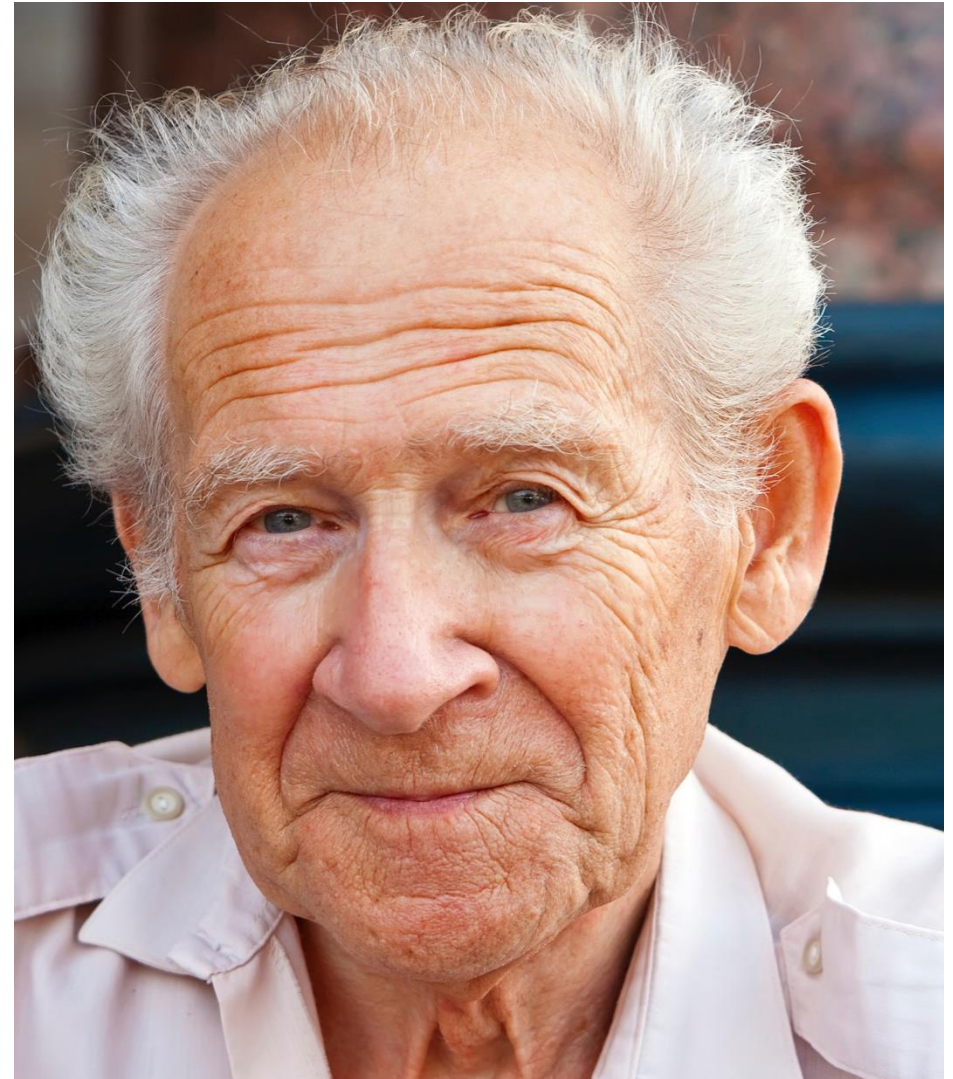


- Multiple care coordination entities with shared goals do not necessarily align organically. Stakeholders can align their goals by following some of these guidelines:
  - Decide who is in charge.
  - Put the person first: Members of the care team all have different relationships with the member, but what does the member really want?
  - Understand the importance of relationship-building and developing a common language.
  - Delineate internal and external roles.
  - Hold virtual multidisciplinary team meetings.
- Identify and refer members to community-based enabling services.

# Good Intentions — The Three-Way Contract and Successful Integration

## Lessons learned: Sound operational planning, readiness, and implementation is a “make it or break it” proposition

- Mitigate false starts and slow starts, which affect plan viability.
- Achieve critical mass to ensure program stability — learn how best to reduce opt-outs and accelerate opt-ins in a voluntary environment.
- Activate early, broad, and ongoing provider and stakeholder education and engagement.
- Reduce beneficiary assessment fatigue.
- Shift evaluation requirements from an activity-based focus to an outcomes-based focus.
- Increase integration between the federal government and states.
- Acquire additional data and time to evaluate cost savings and clinical outcomes.
- Early identify and address inevitable systems integration issues at the state and health plan levels.
- Use health plan electronic care management platforms and clinical data warehouses:
  - For health plans to rapidly expand and upgrade these systems to address long-term services and supports (LTSS) populations.
  - To resolve interface issues with existing state systems.





# Innovations Achieved and Lessons Learned at MI Health Link

David R. Neff, DO  
Chief Medical Director  
Office of Medical Affairs  
Medical Services Administration  
Michigan Department of Health & Human Services

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# MI Health Link Demonstration

- ▶ MI Health Link (MHL) is a health care option for Michigan adults, ages 21 or over, who are enrolled in both Medicare and Medicaid (dual eligible), and live in one of four demonstration regions of Michigan.
- ▶ Offers a broad range of medical and behavioral health services, pharmacy, home and community-based services, and nursing home care, all in a single program designed to meet individual needs.
- ▶ The MHL Demonstration started March 1, 2015 and extends through December 31, 2020.
- ▶ 100,000 people eligible
- ▶ 37,000+ people enrolled
- ▶ Physical Health Medicaid Plans (7)
- ▶ Behavioral Health Medicaid Plans (4)





# MHL Goal: Integration & Care Coordination

An organized and coordinated service delivery system across all service domains.

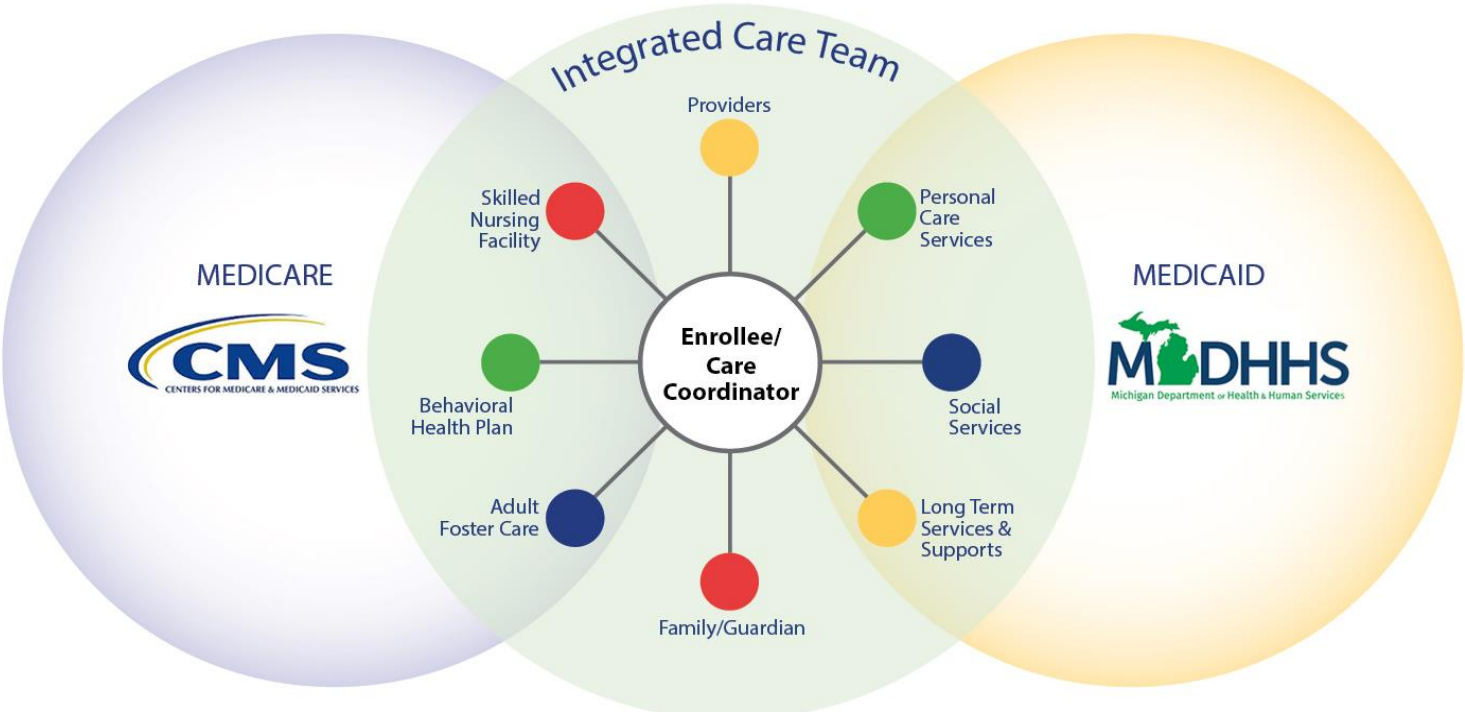
- ▶ Core Features

- ▶ Person-Centered Care
- ▶ Risk Indexing and Assessment
- ▶ Personalized Care Plan
- ▶ Coordinated Data Exchange

- ▶ Additional Features

- ▶ Coordinated Medicare and Medicaid benefits
- ▶ Reduced Fragmentation of Supports & Services
- ▶ Home and Community-Based Services
- ▶ Integrated Physical and Behavioral Health
- ▶ Quality Services Focused on Enrollee Satisfaction

# Integrated Care



7 Integrated Care Organizations (ICO's)



# Care Plan Management

## Enrollee

- ▶ Empowered to plan their life course and care needs
- ▶ Engages in developing a personalized plan
- ▶ Owns the plan
- ▶ Shares the plan with the team
- ▶ Works closely with the Care Coordinator
- ▶ Supported by the team to achieve their goals
- ▶ Updates the plan as needed with the care coordinator



# Care Plan Management

## Care Coordinator

- ▶ Care Coordinator as life coach to empower and enable the enrollee
- ▶ Facilitates the creation of comprehensive person-centered care plan
- ▶ Keeper of the care plan (source of truth)
- ▶ Receives new or updated information
- ▶ Identifies method to share plan with enrollee and care team (fax, email, portal view, electronic exchange)
- ▶ Distributes new or updated information to the team



# Care Plan Management

## Care Plan

- ▶ Starts with Evaluating Needs Through Level I and Level II Assessments
- ▶ Enrollees preferences for care services and support
- ▶ Enrollees prioritized list of concerns, goals, objectives and strengths
- ▶ Summary of health status
- ▶ Plan for addressing concerns or goals
- ▶ Person(s) responsible for interventions, monitoring and reassessments

 Allergies

 Integrated Conditions

 Integrated Care Team

 Individual Integrated Care and Support Plan

 Initial Screening - October 10, 2014

 Level I Assessment - August 10, 2015

 Level II Assessment Referral Response

 NFLOCD

 Social History

 Medications

# The Care Bridge “ICBR” – Transferring Data Back and Forth Between ICO’s and PIHP’s

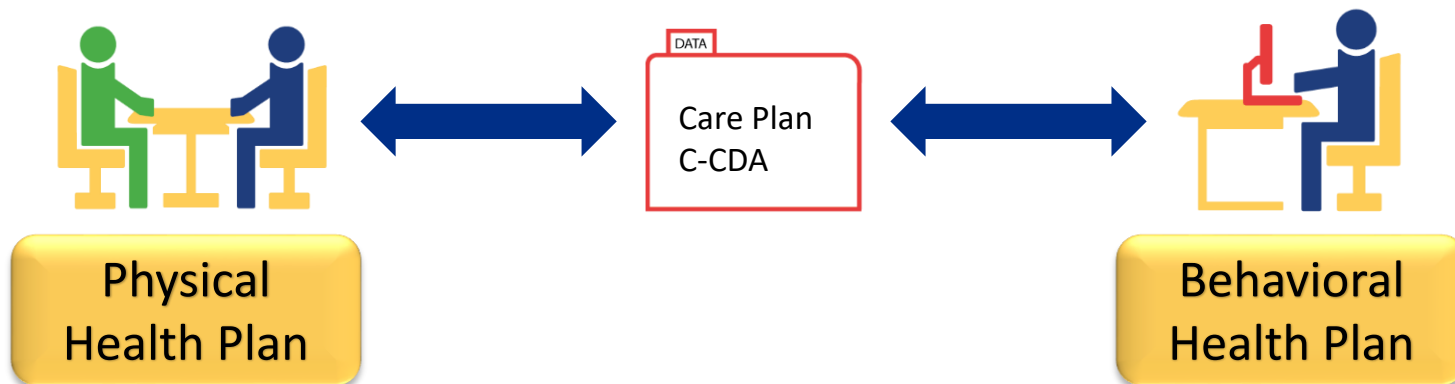
Michigan has a bifurcated physical and behavioral health Medicaid managed care plan system



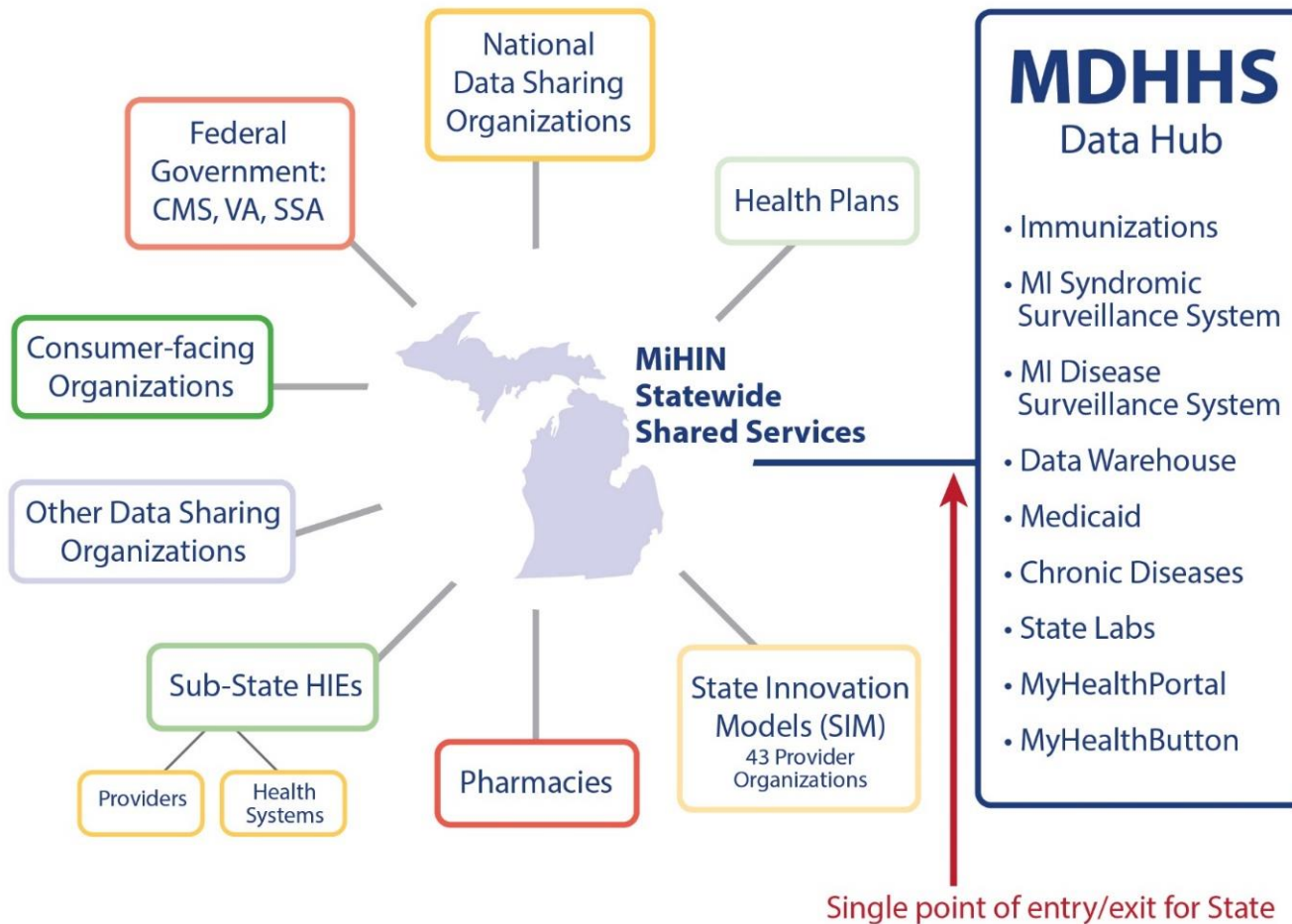
# Care Plan Management

## The Care Plan Leverages the Consolidated Clinical Document Architecture (C-CDA)

- ▶ Standardizes the format and content of care plans for all enrollees
- ▶ Enables electronic sharing with care team members with EHRs
- ▶ Permits care team without EHRs to view and download through portals
- ▶ Allows for customization of care plan view
- ▶ Accommodates inclusion of additional health information



# Future Care Plans Will Have Access to Better Information from the Michigan Health Information Network (MiHIN) & MDHHS Data Hub

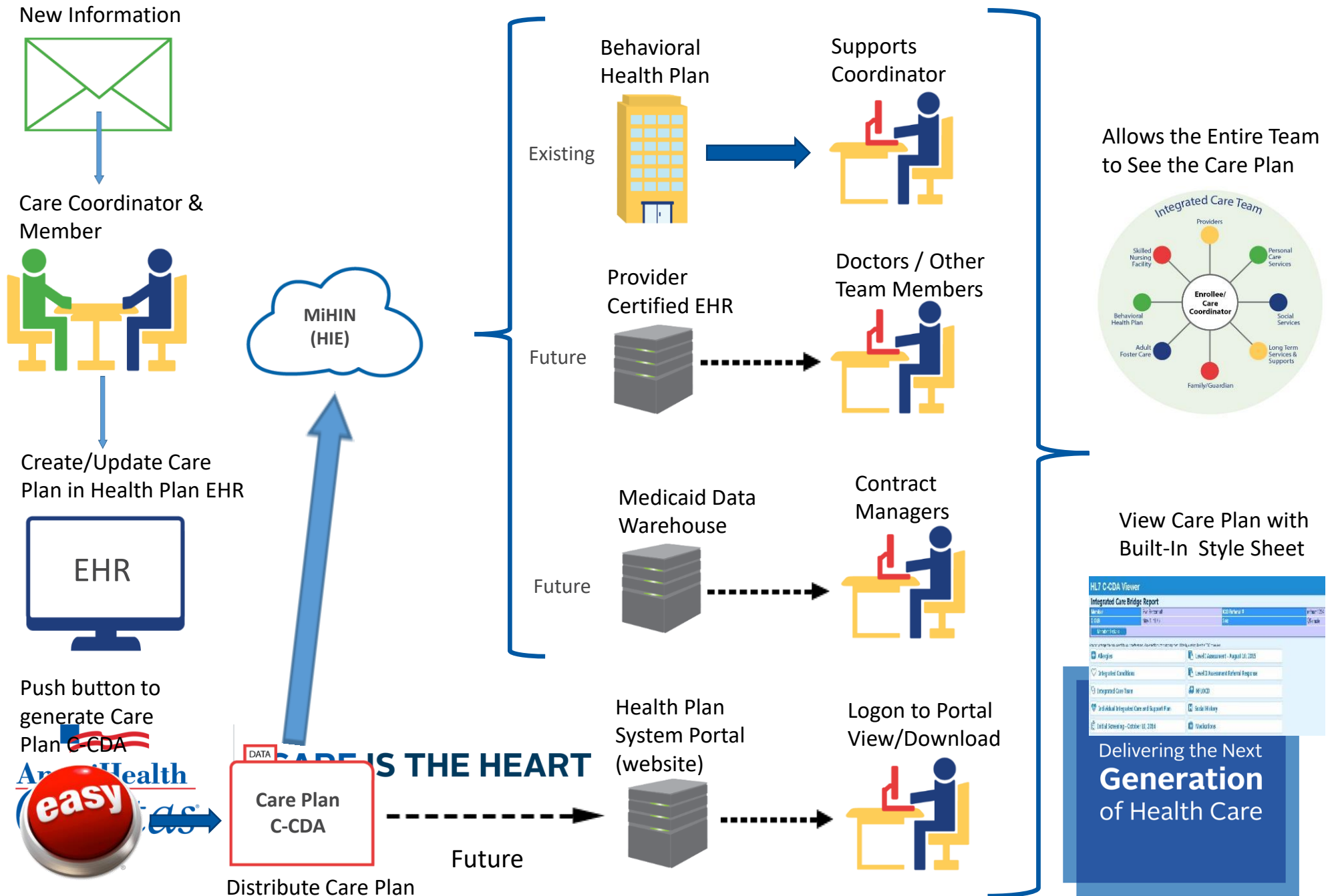


- Better Integration of Medicare Data
- Timely Admission, Discharge and Transfer (ADT) Data
- Risk Indexing
- Lab Data

*\*MiHIN Shared Services is a network-of-networks*



# Present and Future Care Planning: Create, Update & Distribute



# Lessons Learned

1. Many enrollees who still feel like victims of their conditions and the system need to be empowered to engage
2. Care Coordinators can act as life coaches to empower their beneficiaries and guide them on how to engage, but they need time to have meaningful conversations
3. Care Plans should be written by the beneficiary not by the health system imparting actions on their client
4. All team members need access to the Care Plan to best assist the enrollee achieve their goals and provide updates on their activities
5. Data needs to flow to all team members in a seamless manner to allow the enrollee and team to make accurate and timely decisions
6. For each beneficiary, data access should be limited to Care Team Members and Health Systems administrators – beneficiary level access to extended team members will be necessary

# AmeriHealth Caritas VIP Care Plus

Care coordination model

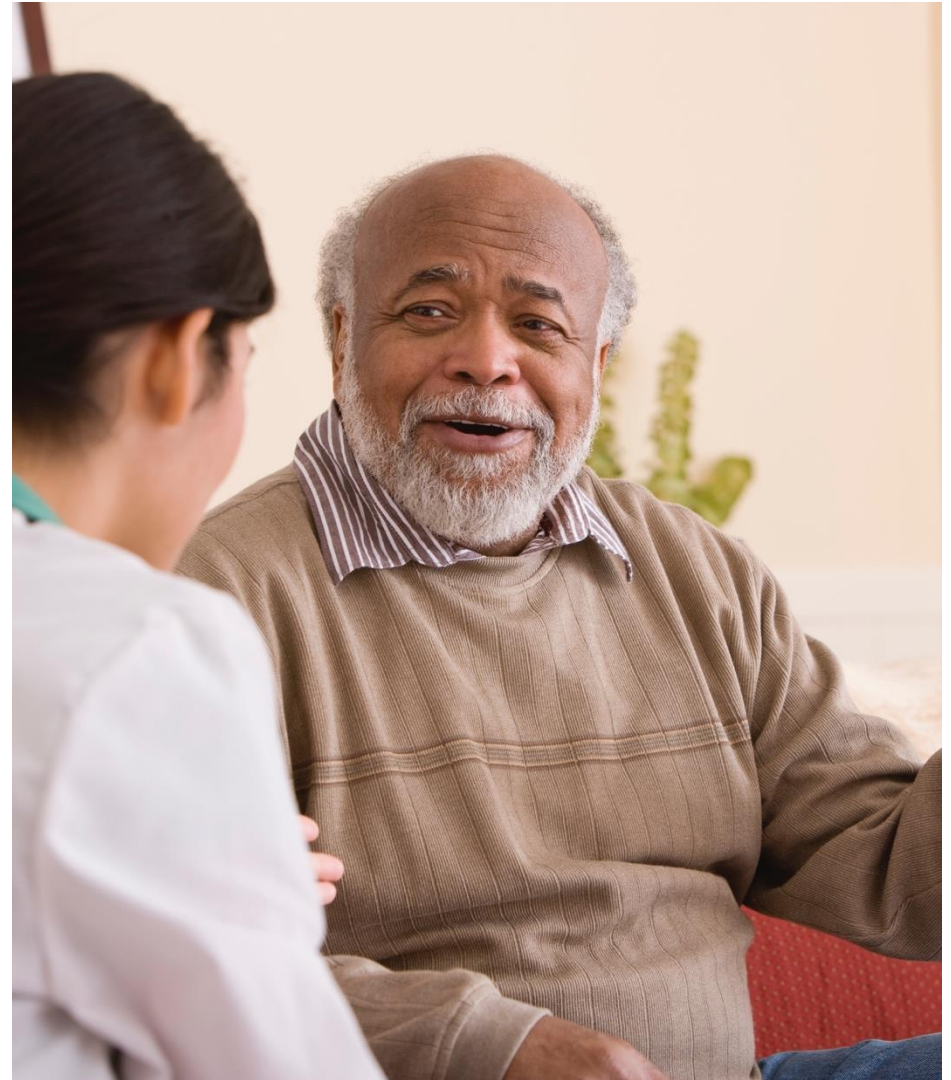
**Thomas Petroff, D.O., FACOOG**

Acting Executive Director and Medical Director

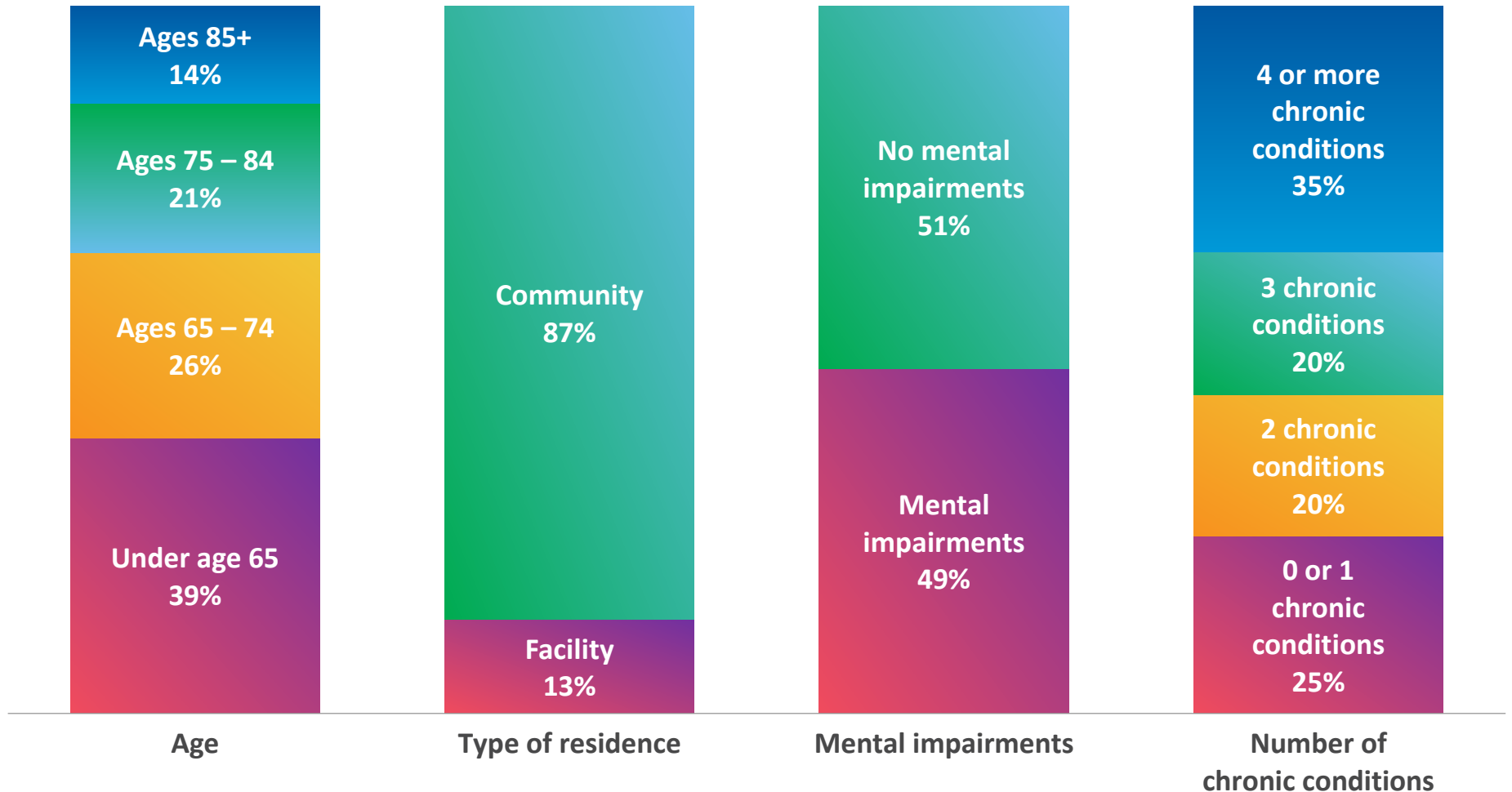


# AmeriHealth Caritas' Michigan MMP

- AmeriHealth Caritas VIP Care Plus is a program that joins Medicare and Medicaid benefits, rules, and payments into **one** coordinated delivery system.
- This plan represents a three-way agreement between CMS, Michigan Department of Community Health (MDCH), and procured integrated care organizations (ICOs).
- ICOs hold sub-contracts with prepaid inpatient health plans (PIHPs) for behavioral health care services.
- AmeriHealth Caritas VIP Care Plus operates in four regions in the state:
  - Two regions each in Wayne and Macomb counties.
  - 3,500 members.



# Model of Care — Why Dual Eligibles Are Special-Needs Members



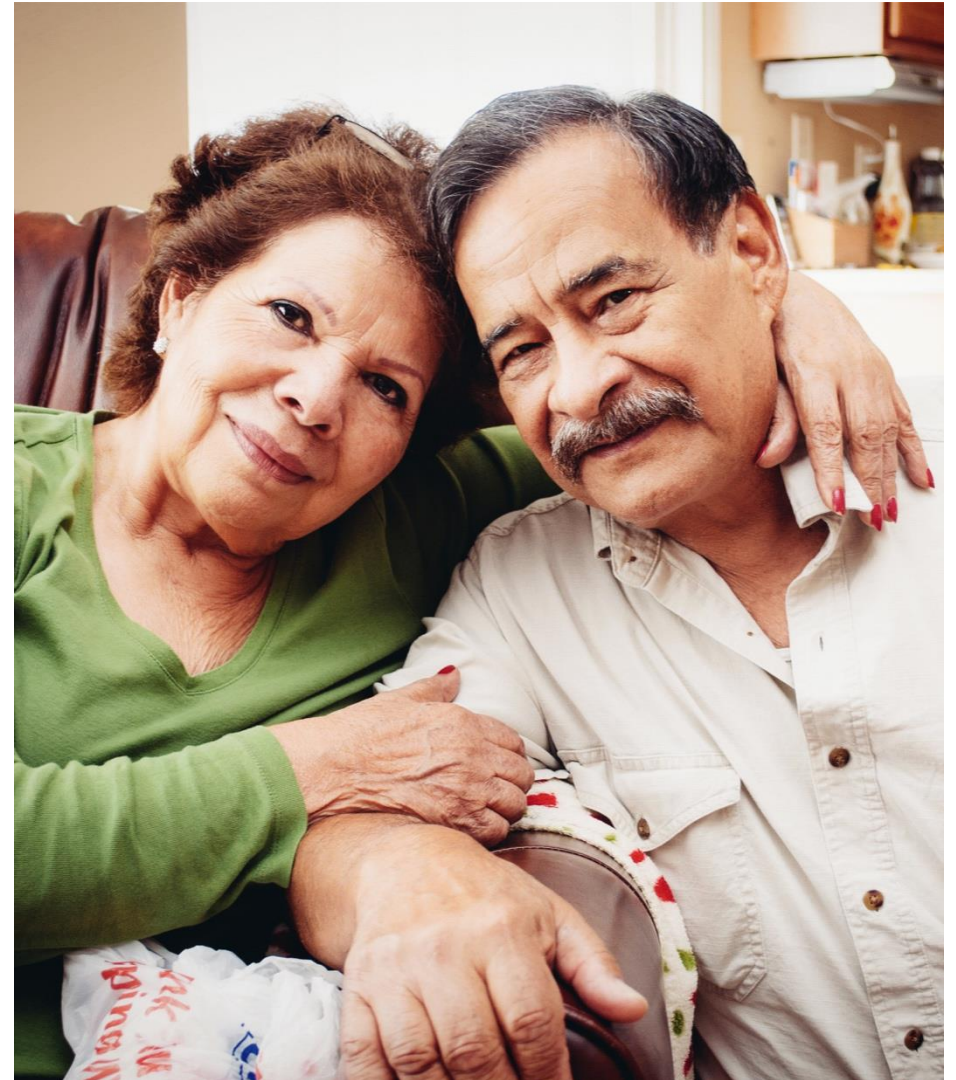
Note: Mental impairments were defined as Alzheimer’s disease, dementia, depression, bipolar disorder, schizophrenia, or mental retardation.  
 Source: Kaiser Family Foundation analysis of the Medicare Current Beneficiary Survey, 2008.

# Integrated Care Approach

- The AmeriHealth Caritas VIP Care Plus Model of Care for MI Health Link is our plan for providing an integrated care management approach to health care delivery and coordination.
- The Model of Care is the “how” of AmeriHealth Caritas VIP Care Plus care coordination model.

## Our Model of Care focuses on:

- Improving health outcomes.
- Access to essential services and affordable care.
- Coordination of care through the medical home and PCP.
- Access to preventive services.
- Seamless transitions.



# Integrated Care Approach

## Goals:

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- Improve health outcomes.
- Delay the need for nursing facility care.
- Reduce avoidable emergency department visits and hospital readmissions.
- Increase access to home- and community-based services.

## Benefits:

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Single plan coverage and point of contact for:

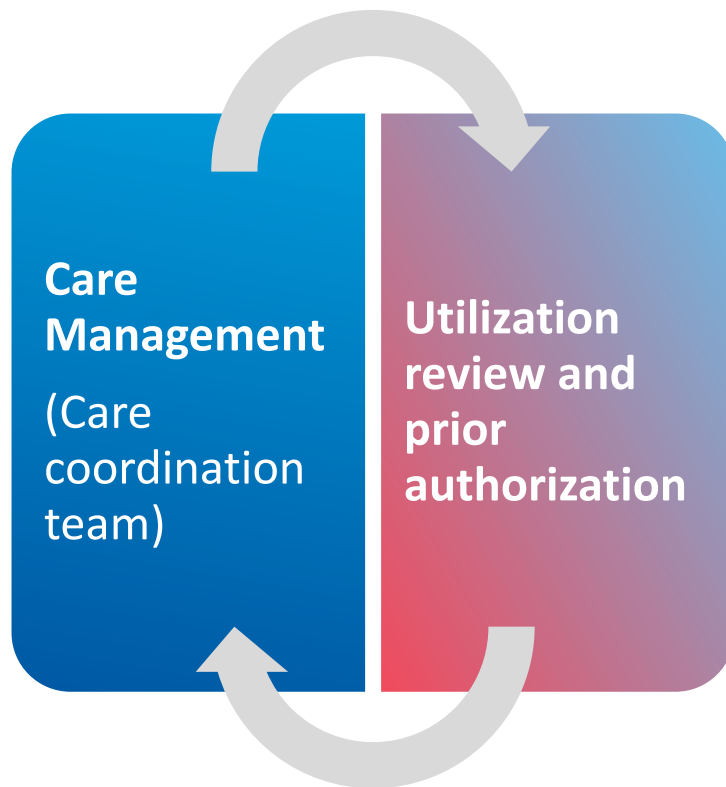
- Medical care.
- Behavioral health care.
- Home- and community-based services and nursing home care.
- Medications.
- Care coordination.\*

### \*Key benefit

AmeriHealth Caritas plans use a **Care Coordination team** to promote these goals and render the benefits. This team will get to know the member and help create a personal care plan based on the member's needs and goals. This team will connect the member with the supports and services they need to address their problems and goals.

# Member Support

## Medical management area



## Care Coordination team





# Integrated Care Approach: Care Coordination Team



## Community Health Navigators

- Are not clinicians.
- Work in the field to:
  - Locate members we could not reach by phone.
  - Support members needing extra assistance.
  - Assist members to identify and access community resources.

## Supports Care Coordinator

- Is a registered nurse (R.N.) or social worker.
- Is a point of contact for LTSS or behavioral health matters.
- Conducts member assessments to help identify their needs, goals, preferences, and strengths.

## Care Coordinator

- Is an R.N. or social worker.
- Is a point of contact for clinical matters.
- Conducts member assessments to help identify their needs, goals, preferences, and strengths.

## Personal Care Connector

- Is a non-clinical customer service agent.
- Fields member phone calls.
- Is the first contact with the member and works in tandem with Community Health Navigators to:
  - Schedule PCP appointments.
  - Answer benefit questions.
  - Arrange for transportation.

# Integrated Care Approach: Provider Collaboration

## Working with AmeriHealth Caritas

### Requests for skilled care (not room and board) and durable medical equipment (DME)

Providers should contact Utilization Management (UM) at designated intervals by phone or fax with the appropriate documents.

### Requests for custodial authorization

Providers should contact Medical Management so they can determine the next steps in obtaining custodial authorization.

The Care Coordinator may need to assess the facility before providing authorization, or providers may only need to provide the signed and completed Freedom of Choice (FOC) with the 2565 form.

### Assistance with transitions to home

Providers will work with both LTSS and Medical Management.

The LTSS team takes the lead on transitions to home and works very closely with Medical Management to make transitions seamless and successful.

### Care coordination

Providers will work with Medical Management for care coordination.

Providers can contact Medical Management or Customer Service to identify which Care Coordinator is assigned to each member or facility.

Care coordination includes going to facilities and hospitals, participating in care conferences, and assisting with transitions from hospitals to either facilities or the community (home).

# Good Intentions: Lessons Learned

Summary and Wrap-up

**Suzie Bosstick**

Director, Long-Term Services and Supports

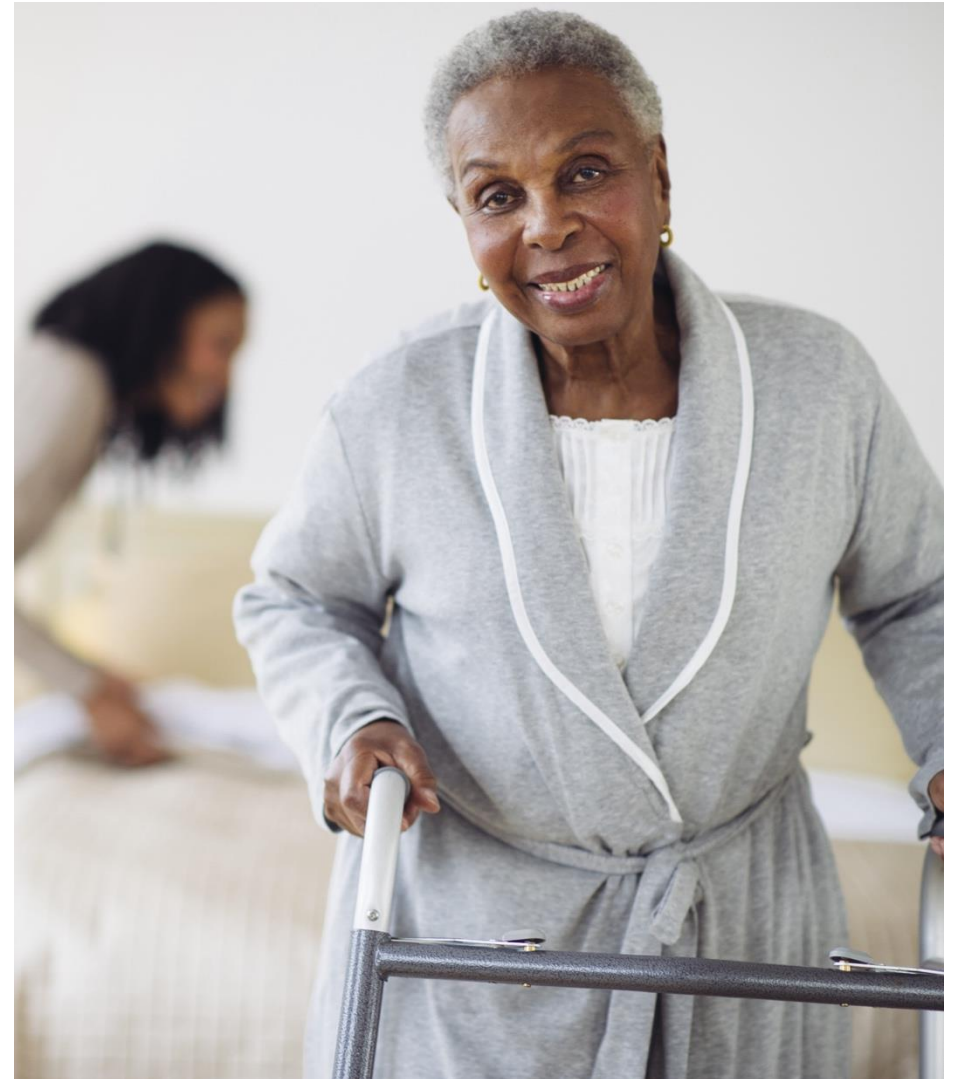


# Lessons Learned

Dual eligible members are often referred to as “super-utilizers,” but the population is not homogeneous: the level of risk varies within the population and changes over time.

## Successful integration requires:

- Nimbleness and the capacity to ensure the Model of Care supports a person-centered approach and recognizes varying risk factors and targets resources accordingly.
- Availability of real-time data to determine needed changes in the Model of Care.
- Integrated systems to support integrated care.
- Integrated data systems and warehouses to define and measure correct outcomes.
- The core of the Model of Care: member-centric care that focuses on quality of life, provides supports to sustain caregivers, and emphasizes palliative care.



# Lessons Learned

## Successful integration requires (continued):

- Greater focus on measuring outcomes and less focus on process.
- Value-based partnerships with key influencers.
- Continuous, ongoing stakeholder education.
- Achieving critical mass for stability and sustainability:
  - A continuously enrolled population to effect individual health behavior change and health system change.
- Appropriate payment rates and incentives designed to drive outcomes.
- Alignment and integration at all levels:
  - Federal.
  - State.
  - Health plan.



More than  
**30 YEARS**  
of making  
**care the heart**  
of our **work.**



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